



## SANTA ROSA COUNTY TOURISM

### DESIGNING NEXT STEPS TO ENHANCE THE SANTA ROSA COUNTY VISITOR ECONOMY

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18 DECEMBER, 2015

ZEITGEIST CONSULTING

**DMO**  
**PRÖZ**

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18 December, 2015

Shannon Ogletree  
Santa Rosa County EDO  
6491 Caroline Street / 4  
Milton FL 32570-4592

Shannon,

Thank you for considering DMOproz to assist Santa Rosa County in developing a strategic vision for the future of the destination and the organization. We're honored and excited at the opportunity to be of service.

Over the past 20 years, we have worked with more than 180 Destinations around the country and helped more than two-thirds develop their Strategic Plans. This experience puts us in a unique position from which to assist your organization. We've seen best practices in action and helped create organizational culture shifts in this ever-evolving Industry.

As we understand your interest, you are searching for a trusted advisor to lead a participatory process to enhance and streamline the governance process for the Santa Rosa County TDC in order to advance the region's Visitor Economy. On the following pages, you'll find our initial thoughts on possible avenues we could travel to achieve that goal.

And, we look forward to the opportunity to be of service in the months ahead.

Sincerely,

A handwritten signature in black ink, appearing to read "Bill Geist". The signature is fluid and cursive, with the first name "Bill" and last name "Geist" clearly distinguishable.

Bill Geist  
President & Chief Instigator



# AGENCY HISTORY

## ABOUT US

**DMOproz** (aka Zeitgeist Consulting, Inc.) is dedicated to increasing the effectiveness and impact of Destination Marketing Organizations (DMOs) across North America. For 20 years, our experience in political advocacy, destination development, community leadership and community marketing has allowed us to provide our clients with a reality-based view of the world...and has provided us the ability to suggest actionable steps to enhance DMO governance, management and marketing initiatives through Strategic Planning and Destination Development. From these assignments, destinations have moved successfully to pursue destination-defining projects as well as connect the dots on infrastructure upgrades, making their communities more attractive for residents and visitors alike.

Founded on the simple premise that Destination Marketing Organizations looking for a consultative hand should be able to turn to someone that has actually done time in the DMO trenches and understands the challenges of the political will at play in our communities, Bill Geist established Zeitgeist Consulting in 1995. But through the years, our offerings have expanded and, as we are working with more virtual partners, we have evolved beyond being just Zeitgeist.

We are still (legally) Zeitgeist Consulting, Inc., only now doing business as DMOproz. As noted in our footer, we are based in Madison WI at 801 Woodward Drive and can be reached via phone at 608-819-6110 or email at [info@DMOproz.com](mailto:info@DMOproz.com). The Zeitgeist Consulting / DMOproz FEIN is #45-4216965.

## WHO'LL BE WORKING WITH YOU

Not unlike the original *Mission: Impossible* television series, DMOproz has its core team...but selects various professionals when the assignment calls for added talent. In this endeavor, we are assigning the Founder of DMOproz, Bill Geist, and our VP of Client Services, Terri White.



### Bill Geist • Chief Instigator

Bill Geist brings over 40 years of marketing experience and 30 years in the tourism industry together to lead the DMOproz Team. Since launching the firm in 1995, he has worked with over 180 CVBs, Regional Tourism Organizations and State Tourism Offices...more Destination Marketing Organizations than any firm of its kind in the country.

Formerly the CEO of the Greater Madison (WI) Convention & Visitors Bureau, Bill was at the epicenter of the public battle to build a downtown convention center designed by Frank Lloyd Wright. Prior to his stint in Madison, he directed the Kankakee County (IL) CVB and oversaw a number of top-draw tourism events including the Domino's Pizza Outboard Powerboat National Championships.

He holds an MBA from the University of Wisconsin and an undergraduate degree from Kenyon College. His first book, *"Destination Leadership for Boards,"* is now in its third printing and he is a contributing author of the DMAI-sponsored *"Fundamentals in Destination Marketing."*





### **Terri White • VP of Client Services**

Terri has overseen the DMOproz offices for more than 15 years and performs a wide range of support services including research implementation and assessments for select clients as well as heads the firm's research arm, **DMOvizion**.

She coordinates all communications, logistics and the project flow in and out of our office. Before joining DMOproz, Terri was a Customer Sales and Service trainer for American Girl. She has also served as a Marketing Assistant and Client Advocate for other firms in Wisconsin.

## **REFERENCES**

We invite you to call upon any of our past clients as a testament to our commitment and professionalism. You can find a list on our website at: [DMOproz.com](http://DMOproz.com) > About Us > Our Clients. However, in the interest of time we can provide the following list of those that for which we have performed Strategic Plan facilitation in the past couple years:

**Visit Sarasota County:** contact Virginia Haley, [vhaley@visitsarasota.org](mailto:vhaley@visitsarasota.org)

**Gulf Shore + Orange Beach Tourism:** contact Herb Malone, [hmalone@gulfshores.com](mailto:hmalone@gulfshores.com)

**Visit Duluth MN:** contact Anna Tanski, [anna@visitduluth.com](mailto:anna@visitduluth.com)

**Irving CVB:** contact Maura Gast, [mgast@irvingtexas.com](mailto:mgast@irvingtexas.com)

**Surf City USA:** contact Kelly Miller, [kelly@surfcityusa.com](mailto:kelly@surfcityusa.com)



## PROPOSED PROCESS

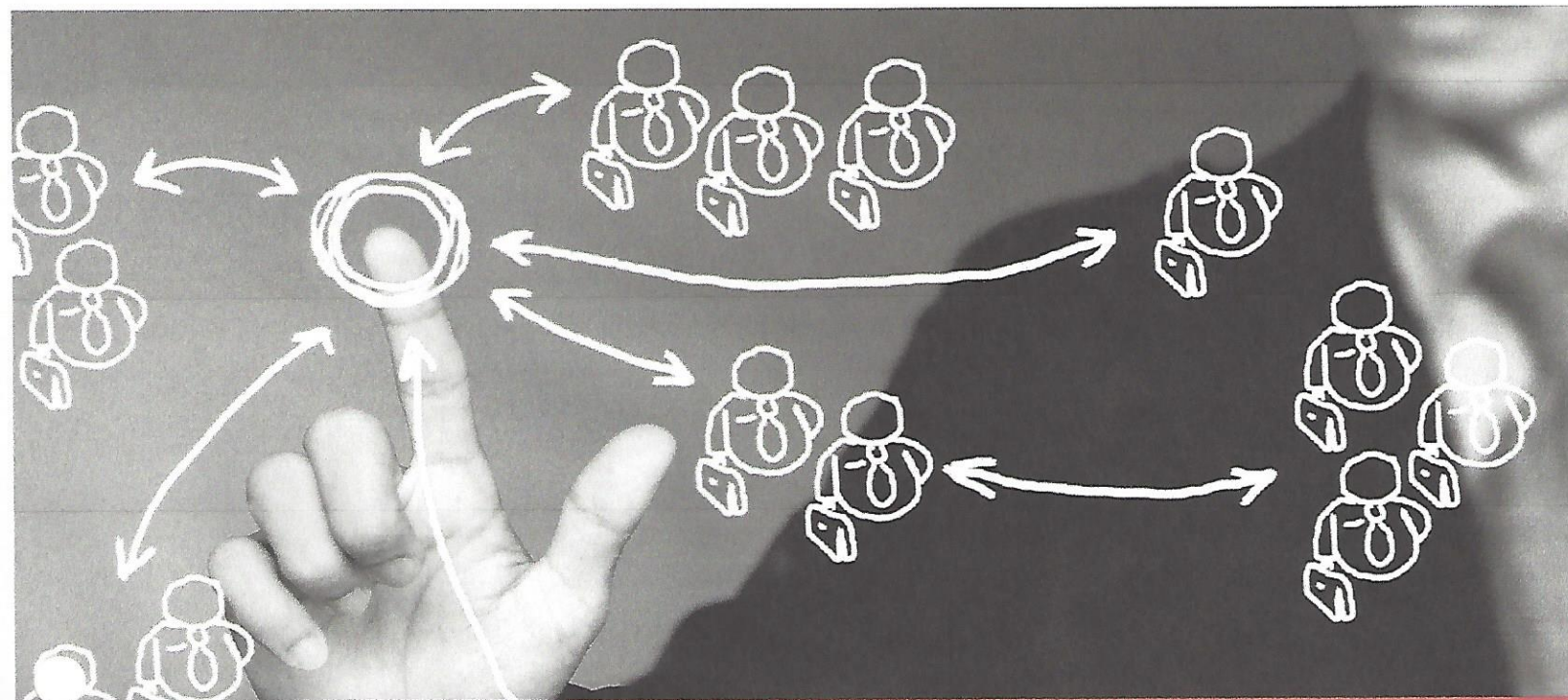
As we discussed earlier this week, your primary interest in engaging an industry-experienced consultant is to work with the Board of the TDC to assist them in transitioning from their past role in setting direction and policy for the former DMO to a more advisory capacity. In our work with roughly a dozen Florida destinations, we have a deep understanding of the various TDC governance models in play in the Sunshine State. This background provides us a solid footing from which to advise how governance within this new model should look for Santa Rosa County.

We also believe that we can maximize your investment by including in our proposal the opportunity to facilitate the development of a Strategic Plan for the destination and the TDC. Especially given the Board's evolving role, doing both a review of governance models and future visioning would seem to be a natural combination.

### BOARD GOVERNANCE WORKSHOP

Our Board Governance Workshops are designed to develop a strong culture of destination vision, organizational collaboration and cooperative advocacy. In the first of two 90 minute sessions, Bill Geist (author of *Destination Leadership for Boards*) will outline for the TDC Board how the best Boards are evolving in today's disruptive environment. Channelling equal parts John Carver (often called the "Godfather of Modern Governance") and the work of Harrison Coerver and Mary Byers (*Race for Relevance*), Bill will help Board Members see the bigger picture of the time they invest in the TDC and suggest ways that they can create a bigger impact on the destination and organization.

In the second session, Bill will lead a participatory discussion in which the tenets of *Destination Leadership* can be applied to the realities of Santa Rosa County. As part of our package, each member of the Board will receive a copy of *Destination Leadership for Boards*.





## STRATEGIC PLANNING

Our Strategic Planning process involves a number of steps, some of which are optional (listed at the end of this section) and others that we believe are crucial to developing a plan that builds upon existing Strategic Plans from like interests and agencies and becomes an active roadmap for the TDC Board.

**Online Surveys.** After situational discussions with DMO leadership, we will craft an online questionnaire for the TDC to distribute to community and hospitality industry Stakeholders. This questionnaire will be designed to be completed roughly a month prior to our onsite planning sessions. The questions will focus on stakeholders' feelings about the organization and destination...and their visions for the future.

We also survey the TDC Board, allowing us to save time in the upcoming face-to-face Strategic Planning session that can be better utilized in active give-and-take discussion. It also serves to jump start participants' thinking so they will be ready for the upcoming session.

**Strategic Planning Retreat.** We'll then lead a full-day Retreat with the Board to examine the concepts unearthed in our preliminary surveys to lead the discussions of what lies ahead for the future of the Organization and the Destination. Our typical format is to spend the morning ideating as many issues as possible, getting everything out on the table for analysis and allowing for meaningful conversations about the current state of the hospitality industry, Board governance objectives, Board/Staff relations and other topics related to organizational development. Just prior to Noon, we'll walk the Board through an exercise adapted from one designed by Stanford professor BJ Fogg to prioritize opportunities based upon importance and difficulty. The afternoon will then be spent identifying how the top opportunities can and will be addressed.

**Follow-Up Documentation.** Following our exploratory research and time in destination, we'll prepare and deliver a Draft Strategic Plan that identifies the Goals, Objectives and suggested Tactics of the top ideas developed by the Board and Staff. These documents include a synopsis of discussions and concepts aired during our interaction with Stakeholders, Board and Professional Staff and a complete set of recommended steps to achieve the primary Goals of the TDC and the County. These documents tend to run in the 25± page range and are intended to guide the agenda of future TDC Meetings and Staff initiatives.





**Stakeholder Interviews (Optional).** While the majority of the TDC's Stakeholders will be satisfied with being a part of the Strategic Planning process through the online survey instrument, there may be those that would benefit from face-to-face interaction. And, we can go two different ways on this (or both). We can schedule up to 12 :30 minute one-on-one Stakeholder interviews prior to the Strategic Planning Workshop. Or, we could schedule two or three focus groups of Stakeholders from which we can glean intel for use in the Workshop. Or, we can mix-n-match with a half day of interviews and a Focus Group or two. Should it be determined that a single day of interviews/groups is insufficient, we would be glad to add additional days. This option is priced at \$1,500/day + travel expenses.

**Presentation of the Plan (Optional).** We have also found that many of our clients benefit from a return visit to present the newly adopted plan to the Board and select industry partners. This discussion helps to solidify the relationships and participation of the community as a whole by ensuring that your key stakeholders voices are being heard and incorporated into the future direction of their DMO. Should you wish to add this component to the quote, please add \$1500 + travel expenses.

Should a return visit not be required, we are happy to deliver the same presentation of the Strategic Plan virtually via GoToMeeting at no charge.





## PROPOSED INVESTMENT & TIMELINE

**DMOproz** agrees to provide the outlined **Strategic Planning** Services for the Santa Rosa TDC for the fee of \$9,000 + travel expenses incurred in the successful execution of the proposed process. Airfare to PNS is presently running in the \$425 range for the first quarter of next year.

The fee includes:

- Preliminary scoping discussions with Management
- Creation and analysis of online Stakeholder and Board surveys
- Facilitation of the Planning Retreat with the Board of Directors (which would include an abridged version of the Board Governance Workshop)
- Development of a Final Report with a complete set of Organizational and Destination Recommendations and a complete 3-year Strategic Plan to guide Board and Staff Work
- A copy of *Destination Leadership for Boards* for each Board member.

Adding one day of Stakeholder Interviews and/or Focus Groups would increase the fee to \$10,500 + travel. Two days, if deemed necessary, would bring the fee to \$12,000 + travel.

The **Board Governance Workshop** alone, without the Strategic Planning component, would run \$4,000 + travel.

On projects of this size, DMOproz respectfully requests a 20% down payment upon execution of the contract to hold dates...and bills for the remaining fee upon the successful completion of the project.

### TIMELINE

We understand that we are merely in the exploratory phase of a potential relationship, but DMOproz dates in the first quarter of the year tend to go fast. If you believe there is support for moving forward, we suggest requesting a "hold" on potential dates to provide you right of first refusal if another client comes calling for your preferred timeframe.

We presently have the following dates in the first quarter of 2016 available to travel to Santa Rosa County:

February 22-24

March 2-4

March 8-11

March 15-18

March 29-31

Thanks again for considering us. We look forward to discussing these initial thoughts in the days ahead.